

displaying a first transaction entry from the financial statement comprising a received payee name and an associated transaction amount;

receiving a user command replacing the received payee name with a preferred payee name;

creating a data structure including a record associating the received payee name with the corresponding preferred payee name;

automatically replacing the received payee name with the preferred payee name for each occurrence of the received payee name in the financial statement;

receiving a subsequent electronic financial statement comprising one or more transaction entries including the received payee name; and

automatically checking the data structure for the record associating the received payee name with the corresponding preferred payee name, retrieving the corresponding preferred payee name, and replacing the received payee name with the corresponding preferred payee name in each occurrence of the received payee name in the subsequent financial statement.

F1

33. (Amended) A computer system configured to automatically rename payee names received from the electronic transfer of financial data into a personal financial management program by performing the steps of:

receiving a financial statement comprising one or more transaction entries, each transaction entry comprising a payee name and a transaction amount, wherein the received name of a transaction entry payee uniquely identifies a single payee;

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displaying a first transaction entry from the financial statement comprising a received payee name and an associated transaction amount;

receiving a user command replacing the received payee name with a preferred payee name;

creating a data structure including a record associating the received payee name with the corresponding preferred payee name;

automatically replacing the received payee name with the preferred payee name for each occurrence of the received payee name in the financial statement;

F2

receiving a subsequent electronic financial statement comprising one or more transaction entries including the received payee name; and automatically checking the data structure for the record associating the received payee name with the corresponding preferred payee name, retrieving the corresponding preferred payee name, and replacing the received payee name with the corresponding preferred payee name in each occurrence of the received payee name in the subsequent financial statement.

40. (Amended) A computer-readable medium on which is stored a computer program comprising instructions which, when executed by a computer, perform the steps of:

receiving a financial statement comprising one or more transaction entries, each transaction entry comprising a payee name and a transaction amount, wherein the received name of a transaction entry payee uniquely identifies a single payee;

displaying a first transaction entry from the financial statement comprising a received payee name and an associated transaction amount;

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receiving a user command replacing the received payee name with a preferred payee name;

creating a data structure including a record associating the received payee name with the corresponding preferred payee name;

automatically replacing the received payee name with the preferred payee name for each occurrence of the received payee name in the financial statement;

receiving a subsequent electronic financial statement comprising one or more transaction entries including the received payee name; and

automatically checking the data structure for the record associating the received payee name with the corresponding preferred payee name, retrieving the corresponding preferred payee name, and replacing the received payee name with the corresponding preferred payee name in each occurrence of the received payee name in the subsequent financial statement.

F4

47. (Amended) A method for automatically renaming names of payees, wherein the names are received from the electronic transfer of financial data into a personal financial management program, comprising the steps of:

- storing in a data structure preferred names that are each associated with a lookup name;
- receiving a financial statement comprising one or more transaction entries, each transaction entry comprising a received name of a transaction entry payee and a transaction amount, wherein the received name of a transaction entry payee uniquely identifies a single payee;
- for each transaction entry, using the received name of the transaction entry payee as the lookup name to determine whether the lookup name has an associated preferred name in the data structure, and if so, substituting the preferred name of the transaction entry payee for the received name of the transaction entry payee.